



# **Plexus Promotional Gateway User Guide**

*(Web Browser Rep Order Application and PPG Mobile iPad App)*

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*Creating Orders and Managing your Address Book*

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## Plexus Promotional Gateway (PPG)

### Description

The **Plexus Promotional Gateway** Rep Application is a web-based system for sales representatives to easily and quickly order promotional materials. It is available online through a web browser, and through the PPG Mobile iPad App.

**Note:** Adobe Flash version 11.1 is required to use the Plexus Promotional Gateway through your web browser.

The PPG Mobile iPad App can be downloaded from the Apple App store. The first time using the App you will be prompted for the Company ID, which your System Administrator can provide.

The following are instructions for the PPG Rep Application accessed through both a web browser and the PPG Mobile iPad App.

### The Process

The ordering process takes about 5 minutes and your order will be delivered to the designated address in 3 to 5 days.

- As delivery time is 3-5 days, please ensure that you plan and place your orders accordingly.
- In cases of urgency, materials can be shipped overnight. However it will require contacting your system administrator.

### To start

New users will receive a welcome email with a link to the site. In addition you will be provided with a **temporary** password to access the application for the first time.

### Important

- New users will be prompted to change their **temporary** password to a permanent one of your choice.

If you are experiencing any problems, please contact  
your **System Administrator**

## Login

### Login to the PPG Application

- Click on the URL contained within the welcome email to access the site.

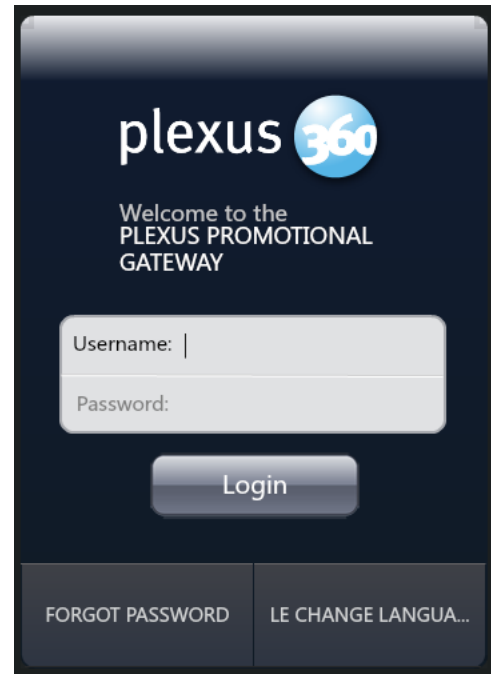
Or

- Select the PPG Mobile App icon on your iPad

**Note:** Bookmarking this URL is recommended for ease of future access.

### User Login

- Enter your username (**company email**) and **password**.
- Click **Login**.



### Welcome Screen

- Upon successful login you will be greeted with the welcome screen.
- On the left you will see a menu with the following links: **Home, Catalogues, Address Book, My Orders, Manage Profile, Search** and **Logout**.



plexus 360

User: Richard Phaneuf

Home

Catalogues

Address Book

My Orders

Manage Profile

Search

Admin

Logout

Current Order

plexus 360

Welcome to the  
Plexus Promotional Gateway

From the Plexus Promotional Gateway you can order promotional materials to be sent to yourself or forwarded to other recipients. If you require any assistance in placing your order please give us a call. We will be pleased to assist you.

Customer Support at:  
Plexus 360 Inc.  
Tel: (905) 829-4877  
Email: ppg@plexus360.com

## Manage Profile

### Note:

It is important to verify (correct and update as needed) your profile, in particular your address, or your orders will not be delivered properly.

### Manage Profile

- Select “**Manage Profile**” from the left menu.
- Verify the information in the boxes is correct. To make corrections click the boxes and make corrections.
- Once corrections are made click “**Save**” to save the changes.



### Light and Heavy Addresses

**The Light Address** is your home address.

**The Heavy Address**, if different, is usually a locker address for larger orders.

### Shipping Notes

**Note:** Shipping Notes set as part of your profile, will appear on ALL orders placed to you.

First Name :	Deene	
Last Name :	Phaneuf	
Email :	dphaneuf@plexus360.com	
Password Created	Aug 3 2012 11:28AM	<a href="#">Change Password</a>
Cell Phone :		
Telephone :	905 829 4877	
Fax Number :		

**Product Split**  % ENG | 25 % FR

**Language Preference** ☐ Eng ☒ FR

**Preferred Shipping Method**  
[Select your preferred shipping ...](#)

**Light Address**

Address 1 :	2902 South Sheridan w
Address 2 :	
City :	oakville
Province :	<a href="#">British Columbia</a>
Country :	<a href="#">Canada</a>
Postal Code :	v2a 3v5

**Heavy Address**

Address 1 :	29
Address 2 :	
City :	Mississauga
Province :	<a href="#">British Columbia</a>
Country :	<a href="#">Canada</a>
Postal Code :	v2a 3v5

**Shipping Notes**

Leave at Landlord's

## Placing an Order

*Allows the user to place an order  
for shipment to themselves and/or others.*

There are 3 steps to placing an order:



**1. Select Product(s)**



**2. Select Recipient(s)**



**3. Checkout**

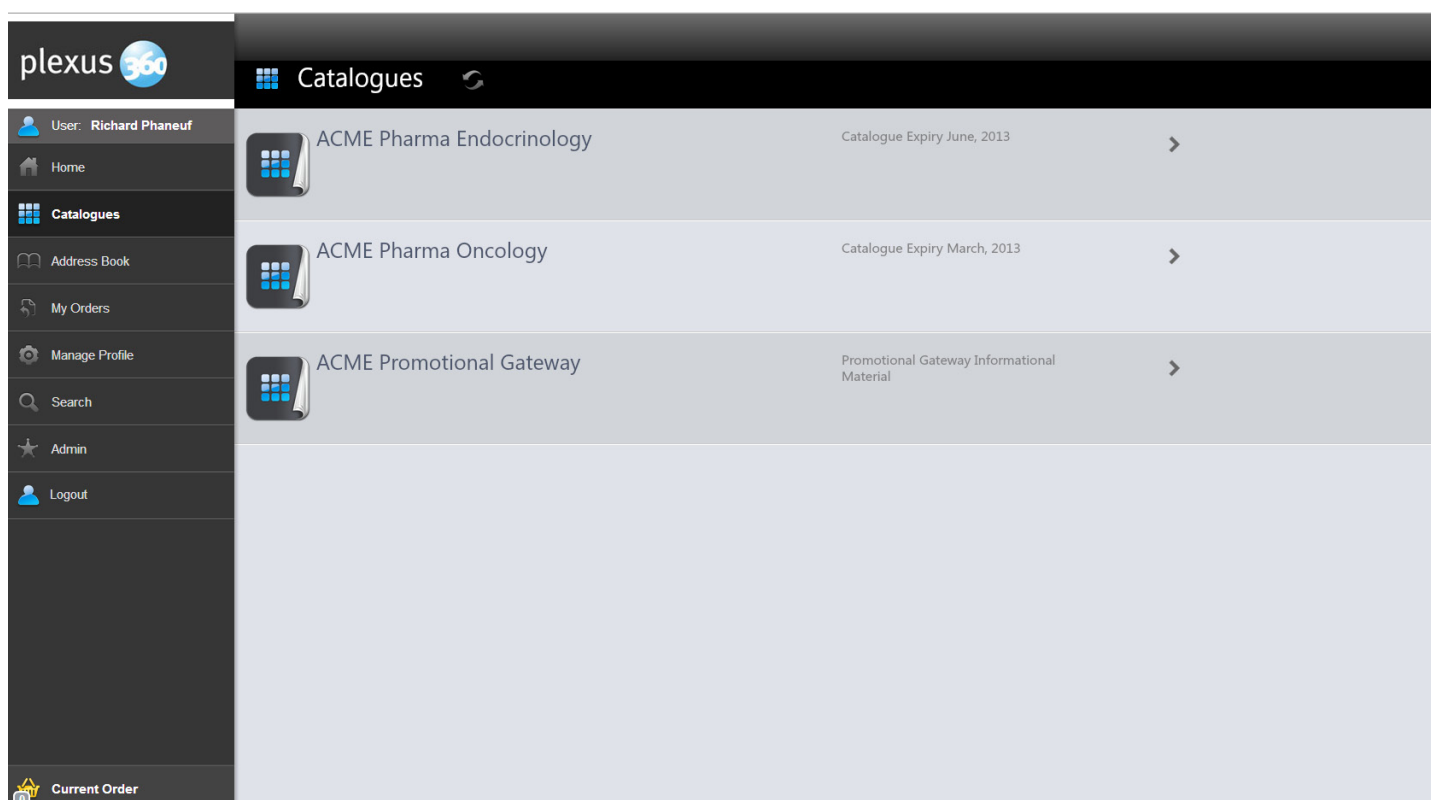
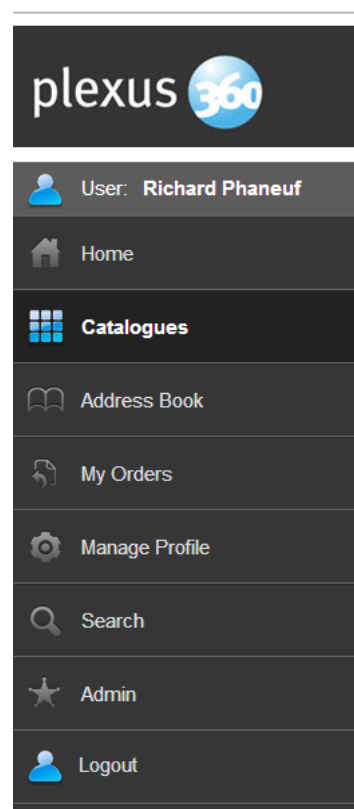
# 1. Select Product(s)

## Choosing a Catalogue

- Products are arranged in catalogues for ease of viewing.
- Only catalogues available to the user will appear.
- Select “**Catalogues**” on the left menu.
- A list of available catalogues will be displayed (see below).
- Select a Catalogue to browse for products.

### Note:

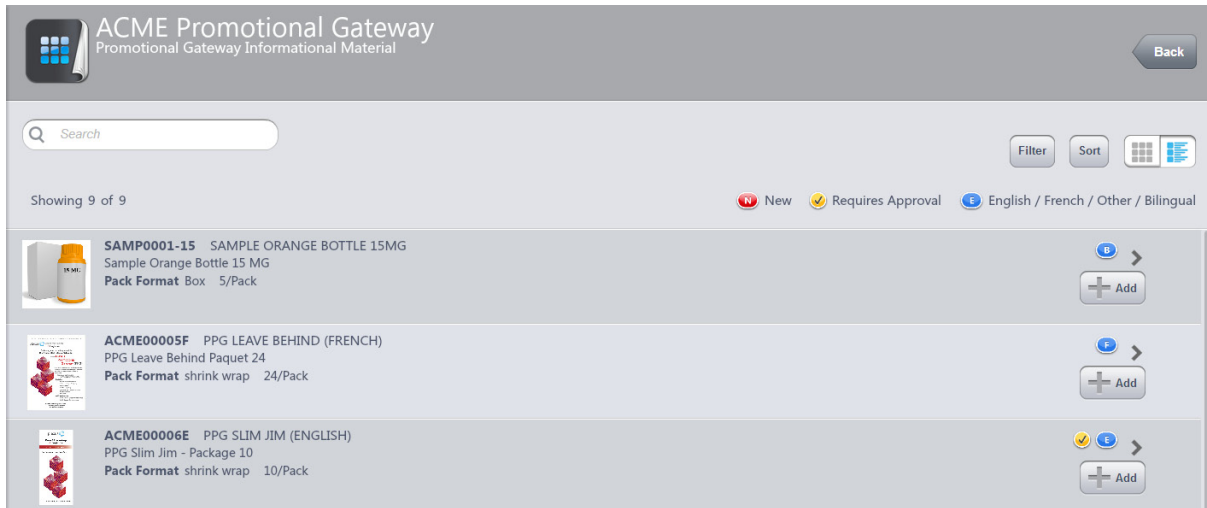
Free Goods Catalogues and Regular Catalogues cannot be combined on the same order.



## 1. Select Product(s) (continued)

### Product List

- All of the products associated with the catalogue will be displayed.



The list view of a catalogue includes:

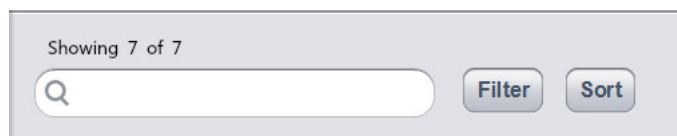
- Product Name**
- Product Code**
- Product Description**
- Package Format:** Describes how an item is packaged.  
*Example one: 10/Pack - If you order a quantity of 1, you will receive 1 pack of 10 single units.*  
*Example two: 10/Pack - If you order a quantity of 10, you will receive 10 packs of 10 single units (100 single units).*

### Viewing a Catalogue

You can view a catalogue in either “**List View**” or “**Grid View**”.



You can also “**Search**”, “**Sort**” and “**Filter**” each catalogue in any combination of ways to help locate particular products for your order.





## 1. Select Product(s) (continued)

### Product Icons

As well as code, name and description, some products also have icons providing further details on the product.



New Product  
*(Added within the last 90 days)*



Orders with these products will be sent to the Product Manager for approval before shipping. All products in the same order not requiring approval, will ship immediately.



Refers to the language of the product  
*[from left to right: English, French, Both/Bilingual, Other]*

(Some products are available in multiple languages, ensure you select the correct one)

## 1. Select Product(s) (continued)

### View Product Details

- To view more details about a product simply click anywhere on the desired product in the catalogue.
- This will direct you to the product details page.
- Here you can view additional details on a product including full description and a larger image.

**Maximum** sets the maximum number of units that you can order over the life of the catalogue.

**Increment** is the number of units the “quantity” is forced to increase by when adding to an order.

**Remaining** indicates units available to the user to order until the expiry of the catalogue.

**Inventory** is the amount of inventory in the warehouse.

**Note:** Items currently out of stock will not appear in the catalogue.

Product Detail

Back

**PPG LEAVE BEHIND (ENGLISH)**  
**ACME00005E**  
PPG Leave Behind Package 24

Package Format			
shrink wrap		24/Pack	

Maximum	Order increment	Remaining	Inventory
245	1	245	245

+ Add to Order

SUPPLY CHAIN MANAGEMENT PROMOTION MATERIALS

plexus 360 Direct Marketing & Logistics

Delivering your marketing materials  
Right time...Right place...Right price

via the **Plexus Promotional Gateway (PPG)**

Multi Medium Communications

Promotional Material Logistics

Data Base Management

Creative

A proven, state-of-the-art, secure Web-Based On-Line Ordering and Fulfillment Solution for sales representatives and hi-value customers.

Easy to use, highly intuitive, self-management functionality...

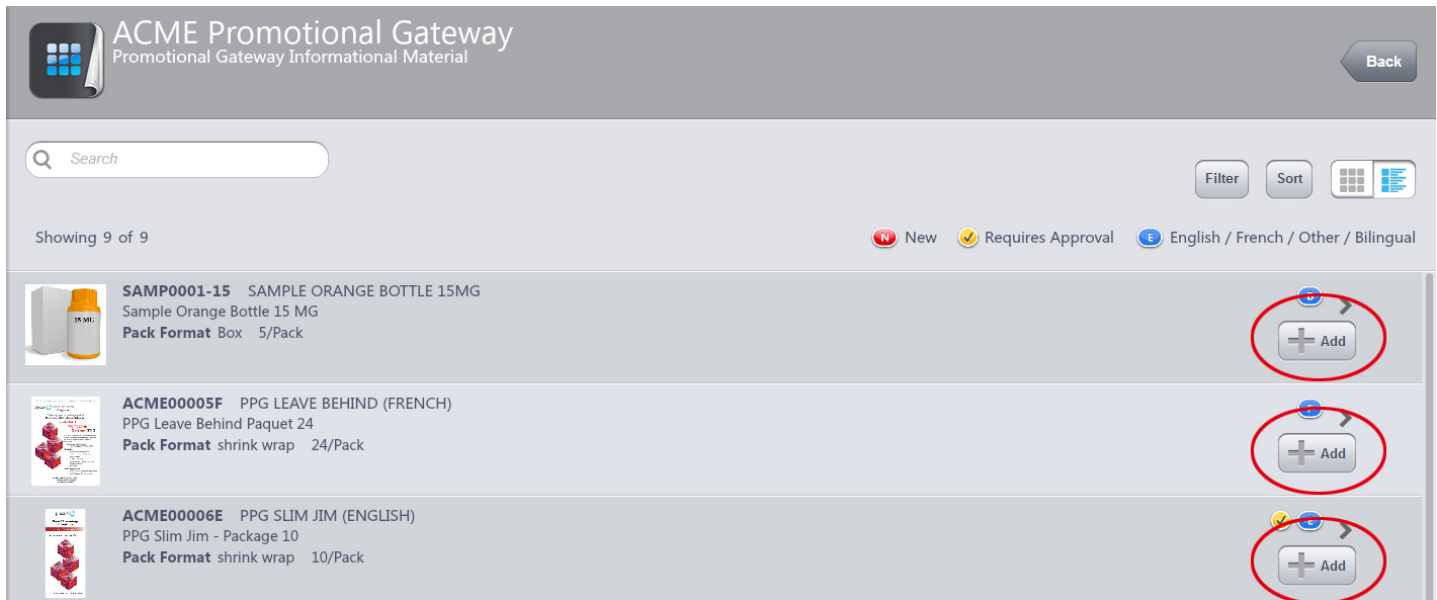
Featuring:

- Multiple audience capability
- Custom catalogue designing
- Order Tracking
- Real-time reporting
- Automated program campaigns to high-value clients

## 1. Select Product(s) (continued)

### Add a Product to Cart

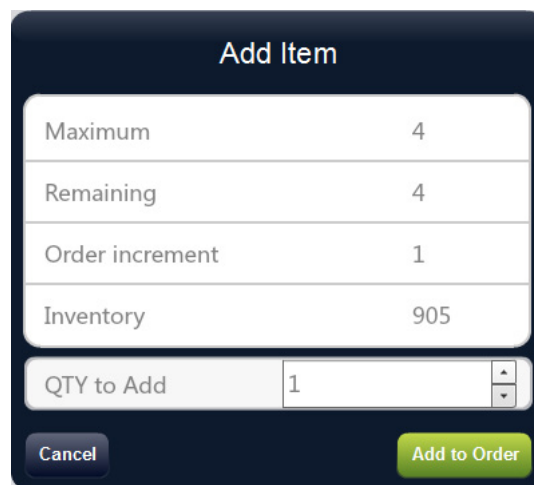
- To add a product to your shopping cart simply click the “**Add**” button next to the desired product in the catalogue list view or product detail view.



The screenshot shows the ACME Promotional Gateway interface. At the top, there's a header with the logo and a 'Back' button. Below the header is a search bar and filters for 'Filter', 'Sort', and a grid/list view toggle. The main content area displays a list of products, each with a thumbnail, product code, name, and pack format. The 'Add' button for each product is circled in red.

Product Code	Product Name	Pack Format
SAMP0001-15	SAMPLE ORANGE BOTTLE 15MG	Box 5/Pack
ACME00005F	PPG LEAVE BEHIND (FRENCH)	shrink wrap 24/Pack
ACME00006E	PPG SLIM JIM (ENGLISH)	shrink wrap 10/Pack

- This will prompt the “**Add to Order**” popup to appear.
- Select the quantity of the given product and click “**Add to Order**”

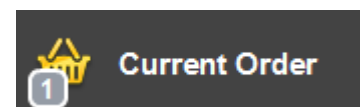


The 'Add Item' popup form displays the following information:

Maximum	4
Remaining	4
Order increment	1
Inventory	905

Below the table, there is a 'QTY to Add' input field with a value of 1. At the bottom, there are 'Cancel' and 'Add to Order' buttons.

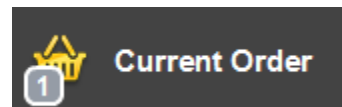
- You may notice that the product counter on the “**Cart**” icon in the bottom left was incremented by the quantity added when you added the product to your order.
- You can click the “**Cart**” icon at any time to view the products in your current cart. We will discuss the cart screen more in the “Check Out” section.



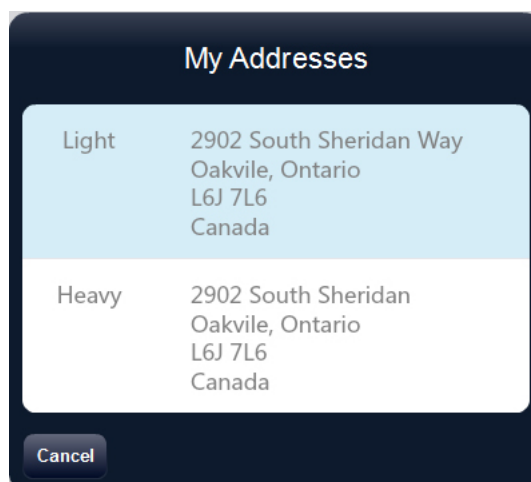
## 2. Select Recipient(s)

### Choosing Recipients

- Select the “**Cart**” icon on the left menu.

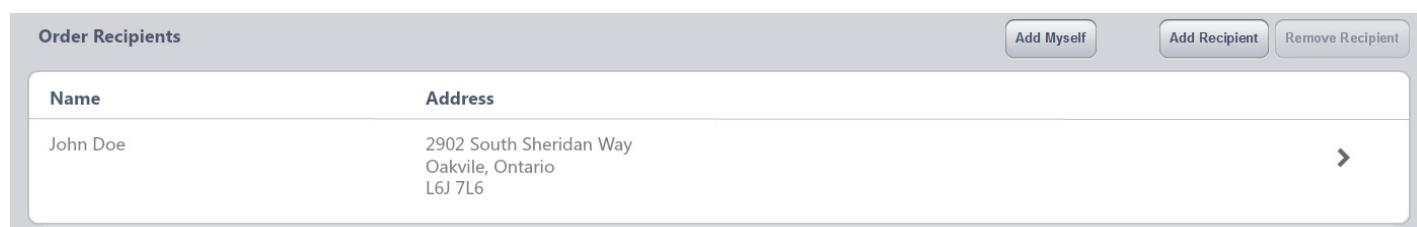


- To add yourself to the order select “**Add Myself**”.
- If you have a different “**Light**” and “**Heavy**” address for your profile a prompt will appear for you to select which address you wish to add. If both your “Light” and “Heavy” addresses are the same, you won’t see the prompt and your address will simply be added to the recipients list.

A dark blue modal dialog titled 'My Addresses'. It contains two rows of address information. The first row is labeled 'Light' and the second 'Heavy'. Both rows show the same address: '2902 South Sheridan Way, Oakville, Ontario, L6J 7L6, Canada'. A 'Cancel' button is at the bottom left.

	My Addresses
Light	2902 South Sheridan Way Oakville, Ontario L6J 7L6 Canada
Heavy	2902 South Sheridan Oakville, Ontario L6J 7L6 Canada


- If you want to ship the order to other recipients then select “**Add Recipient**”.

A table titled 'Order Recipients' with columns 'Name' and 'Address'. It contains one row for 'John Doe' with the address '2902 South Sheridan Way, Oakville, Ontario, L6J 7L6'. Above the table are three buttons: 'Add Myself', 'Add Recipient', and 'Remove Recipient'. A right arrow icon is at the end of the table row.







Order Recipients		Add Myself	Add Recipient	Remove Recipient
Name	Address			
John Doe	2902 South Sheridan Way Oakville, Ontario L6J 7L6			

## 2. Select Recipient(s) (continued)

- From here, simply click the “**Add**” button next to the recipient to add them to the recipients list.

 **Address Book**

Filter+ Add New AddressUpload

Name	Address	
 Patrick Fisher	787 Brookdale Rd PO Box 653 Uxbridge Ontario L9P 1N2	 <span>+ ADD</span>
 Robert Smith	55 Albert Street Suite 2011 Markham Newfoundland L3P 2T4	 <span>+ ADD</span>
 Dr. Bruno Maynard	216-1055 12e Avenue Nord Fleurimont Quebec J1E 2X4	 <span>+ ADD</span>

**Note:**

If the recipient is not in your address book, you may add them by selecting “**Add New Address**”. This will be covered in the “**Address Book**” section.

### 3. Checkout Process

- Select the “**Cart**” icon on the left menu.



#### Review Products in Cart

- First review the items in your order.
- You can still add/remove items as well as edit the quantity to be shipped.

#### Review Recipients List

- Next review the recipients to whom the order will be shipped.
- You can still add/remove recipients.

plexus 360

User: Richard Phaneuf

Home

Catalogues

Address Book

My Orders

Manage Profile

Search

Admin

Logout

Current Order

Current Order (5 item(s))

Items to be included in Order

Back to Items

Add Item

Remove Item

Item	Item Code	Description	Quantity
PPG Leave Behind (English)	ACME00005E	PPG Leave Behind Package 24	5

Edit QTY >

Order Recipients

Add Myself

Add Recipient

Remove Recipient

Name	Address
Richard Phaneuf	101-2902 South Sheridan Way Oakville, Ontario L6J 7L6

>

Shipping Notes

Cancel Order

Submit Order

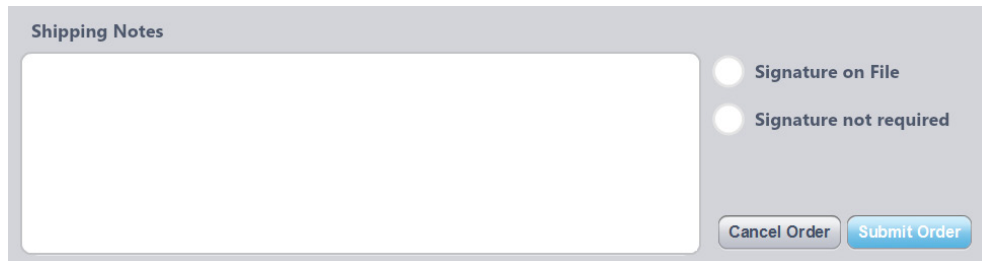
### 3. Checkout Process (continued)

#### Shipping Notes

- You can enter any shipping notes you wish to accompany your order.

#### Note:

Shipping notes for an order will appear on every recipients packages for that order.

A screenshot of a web form titled "Shipping Notes". It features a large, empty text input area on the left. To the right of the input area are two radio buttons: "Signature on File" and "Signature not required". Below these radio buttons are two buttons: "Cancel Order" and "Submit Order".

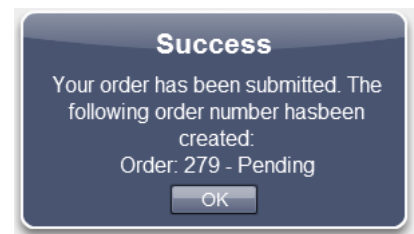
#### Submit Order

Once you have reviewed your order, you may submit by pressing "**Submit Order**" button or "**Cancel**" the order to start over.



#### You have now placed your order!

- A pop up box will appear giving you the Order Number.
- You may wish to make a note of the Order Number for tracking purposes.
- You will receive an email when the order has been processed advising you of the tracking number.



## Address Book

*From your address book you can:*

- *Add New Contacts*
- *Update Contacts*
- *Delete Contacts*

### My Address Book

- Select “**Address Book**” on the left menu.

### Types of Contacts

There are 2 types of contacts in the Address Book.

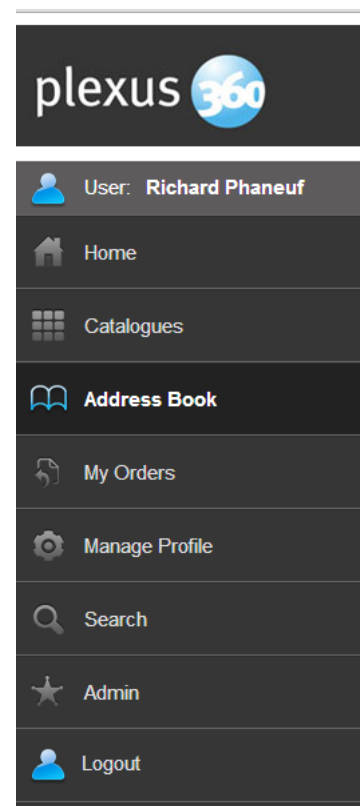


**Global Contacts** are all the users of the system. These contacts are seen by everyone and can only be edited by System Administrators.



**Personal Contacts** are recipients you have added to your Address Book. These contacts are only seen by you and can be edited at anytime.

*Example: An important physician to whom you wish to send products.*

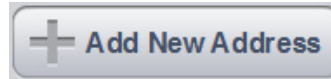




## Address Book (continued)

### Add a New Recipient

- Click “Add New Address”



- Enter all the required fields (\*) for the new recipient.
- All of this information can be updated/edited later.

A screenshot of a web application window titled "Address Detail". The window has a grey header bar with a "Back" button on the left and "Cancel" and "Add" buttons on the right. The main content area is a form with several input fields. Fields marked with a red asterisk (\*) are required. The fields are: Name, Company, Address 1, Address 2, City, Province (dropdown menu showing "Alberta"), Country (dropdown menu showing "Canada"), Postal Code, Telephone, Fax, Email, and Preferred Shipping Methods (dropdown menu showing "None"). Below the form is a section titled "Shipping Notes" with a large text area for notes.

Back Address Detail Cancel Add

\* Name

Company

\* Address 1

Address 2

\* City

\* Province Alberta

\* Country Canada

\* Postal Code

Telephone

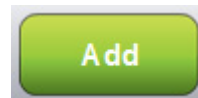
Fax

Email

\* Preferred Shipping Methods None

Shipping Notes

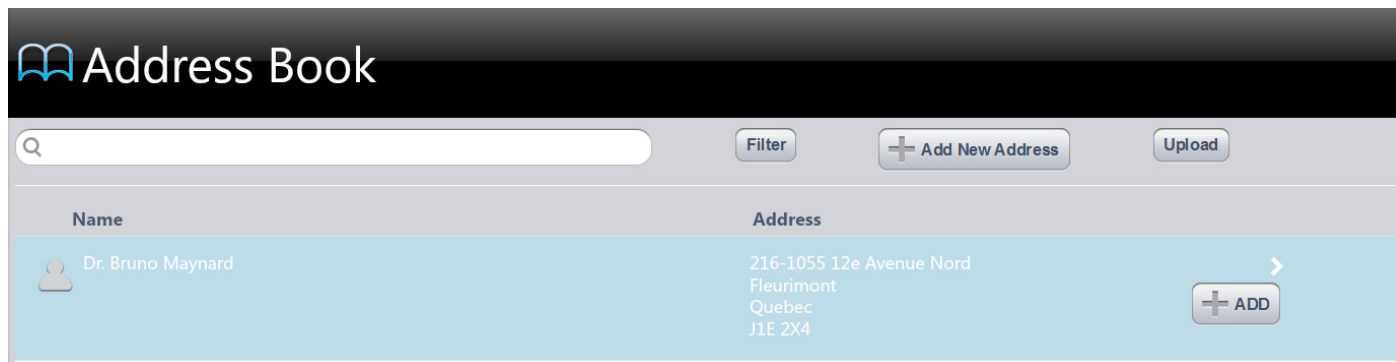
- Once all the required fields have been filled in, simply click “Add”.



## Address Book (continued)

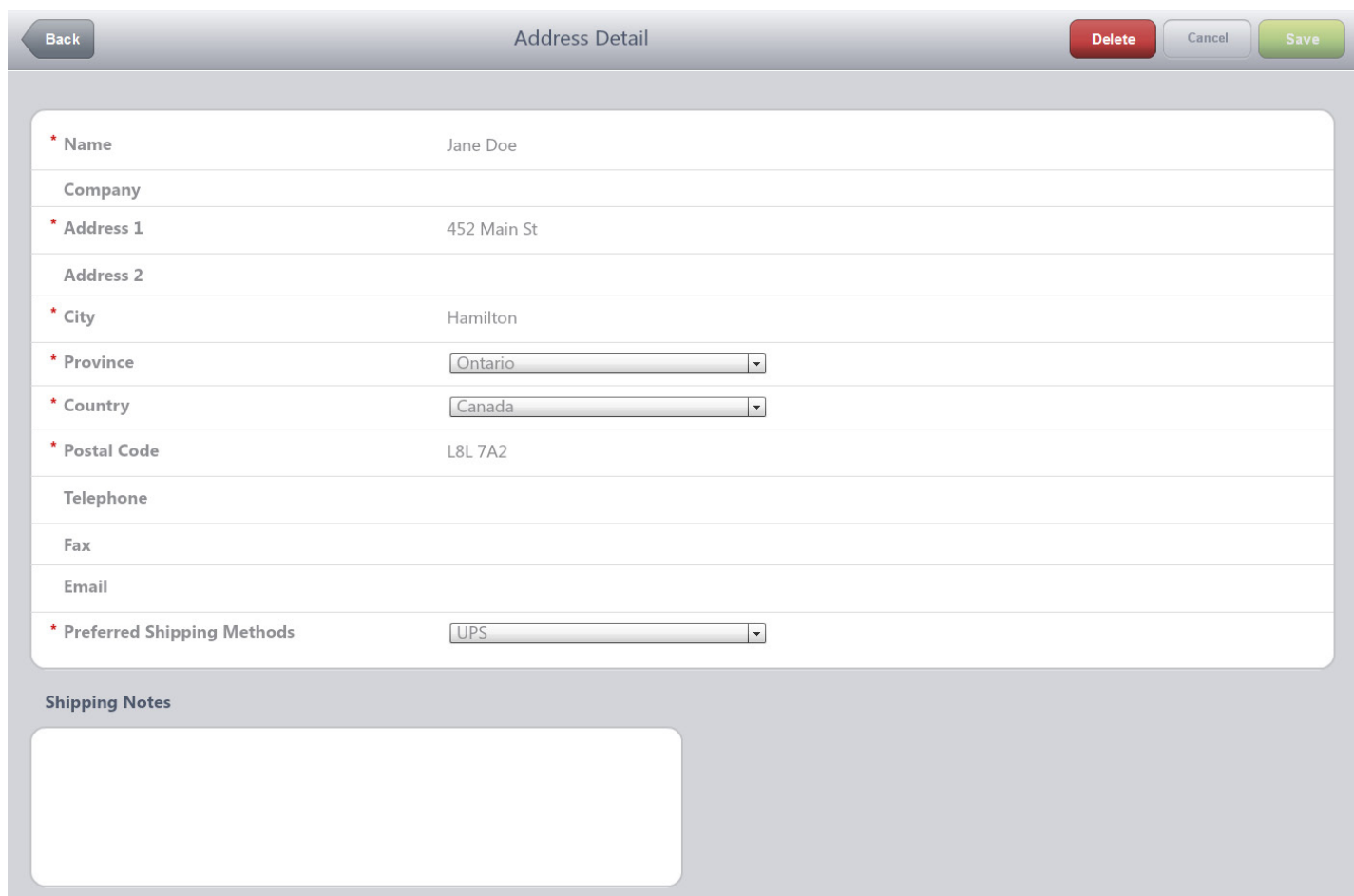
### Manage Existing Recipient

- To edit or delete a recipient's information simply select that recipient from your "**Address Book**"



Name	Address
Dr. Bruno Maynard	216-1055 12e Avenue Nord Fleurimont Quebec J1E 2X4

- Update any of the desired fields or select "Delete" to delete the recipient.



* Name	Jane Doe
Company	
* Address 1	452 Main St
Address 2	
* City	Hamilton
* Province	Ontario
* Country	Canada
* Postal Code	L8L 7A2
Telephone	
Fax	
Email	
* Preferred Shipping Methods	UPS

Shipping Notes

- Once all the desired fields have been updated, simply click "**Save**".



## My Orders

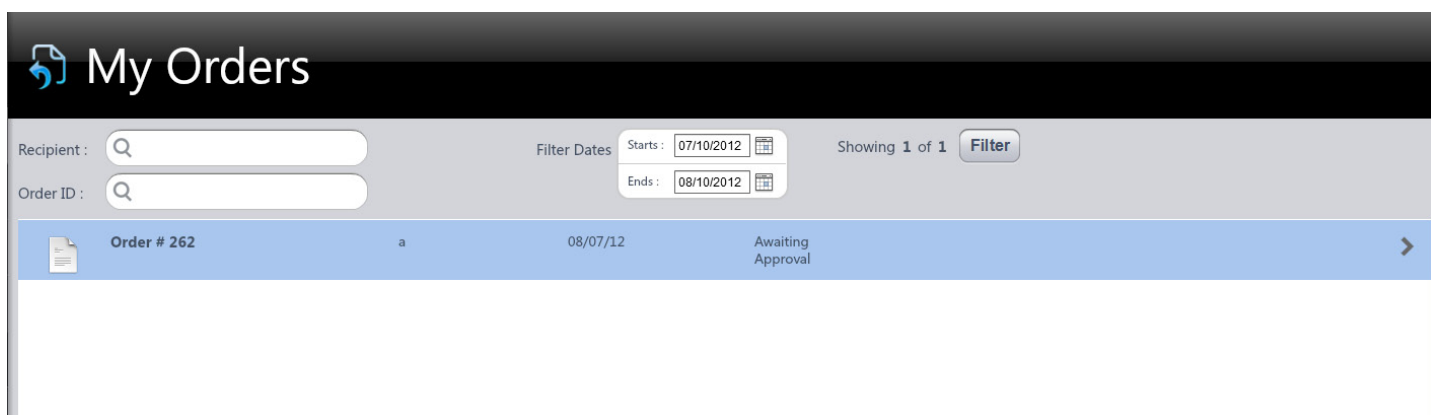
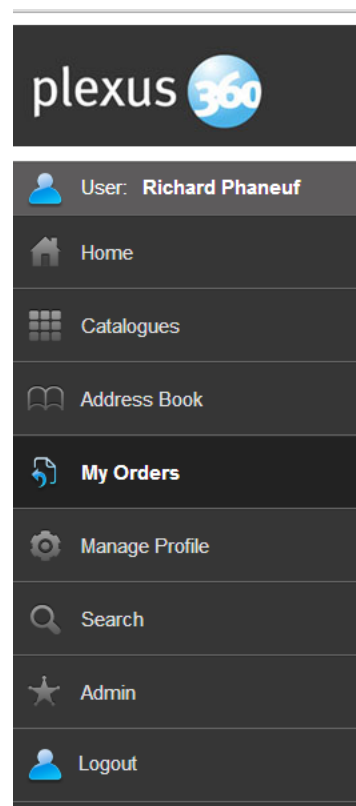
*At any time, a user can check an Order Status re: approvals, shipping, as well as, track its history*

The system is designed to view details of:

- Current and past orders
- Status of orders (pending, awaiting approval or shipped)
- Shipping Dates and Tracking Numbers

### View Orders

- Select **"My Orders"** on the left menu.
- This will open up the **"My Orders"** screen which will show you all of the orders submitted from your account.
- You can Search and Filter by date, order ID and order recipient.



## My Orders (continued)

### View Order Details

- Select an order from the list to view more information about the order including the tracking number.

View Order Detail

Back

ORDER DETAILS

ORDER #:

539

STATUS: Waiting Transmission

DATE:

Oct 23 2012 12:43PM

View Transaction History

ORDERED BY:

Jason Harris

Cancel Order

SENT TO

Jason Harris  
2902 South Sheridan Way  
Oakville, Ontario  
L6J7L6  
Canada

ITEMS IN ORDER

Item#	Name	Unit	Qty	Status
LI80152F08	TAMIFLU-LTCF Visitor Poster	Shrink Wrap	5	Approved

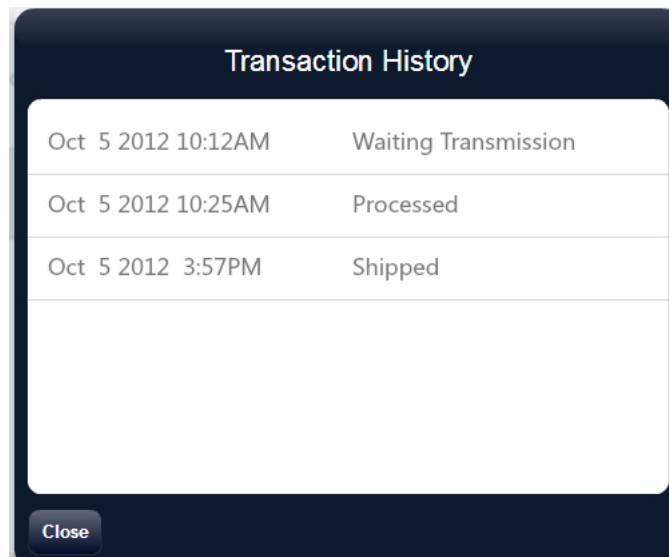
SHIPPING NOTES

TRACKING NUMBERS

## My Orders (continued)

### View Transaction History

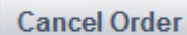
- Select “**View Transaction History**” to view the Order Progress details. (ie. date shipped, date ordered, date sent to warehouse, etc.).

A modal window titled "Transaction History" with a dark blue header and footer. The main content area is white and contains a table with three rows of transaction data. A "Close" button is located in the bottom left corner of the modal.

Oct 5 2012 10:12AM	Waiting Transmission
Oct 5 2012 10:25AM	Processed
Oct 5 2012 3:57PM	Shipped

### Cancel an Order

- If it becomes necessary to cancel an order, select “**Cancel Order**” from the Order Details page.
- An email is automatically sent to the warehouse and System administrators requesting the order be cancelled.
- If the warehouse has not yet processed and shipped the order, the order will be cancelled.

A rectangular button with rounded corners, a light blue gradient, and a thin grey border. The text "Cancel Order" is centered in a blue, sans-serif font.

Cancel Order

## Search

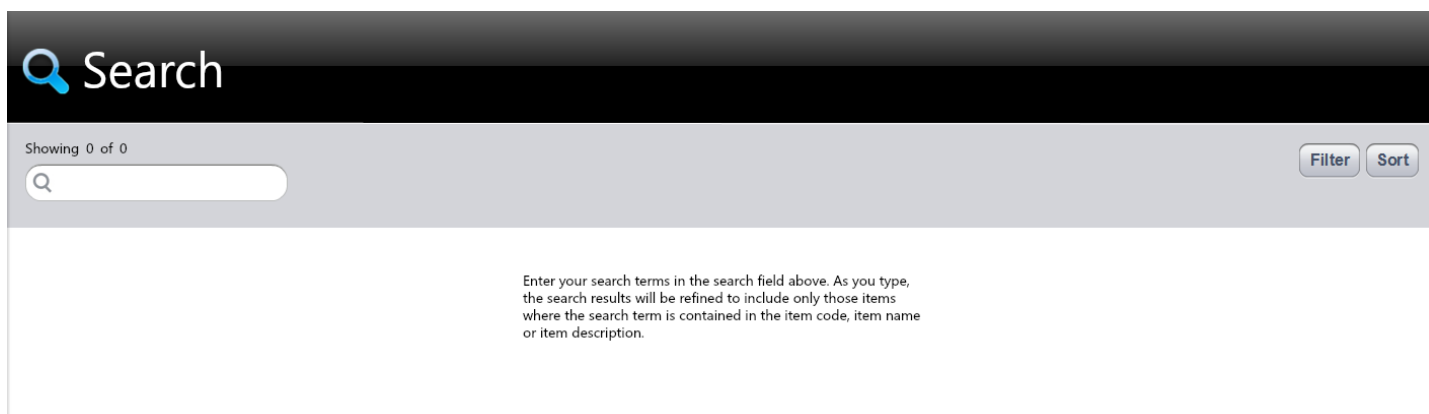
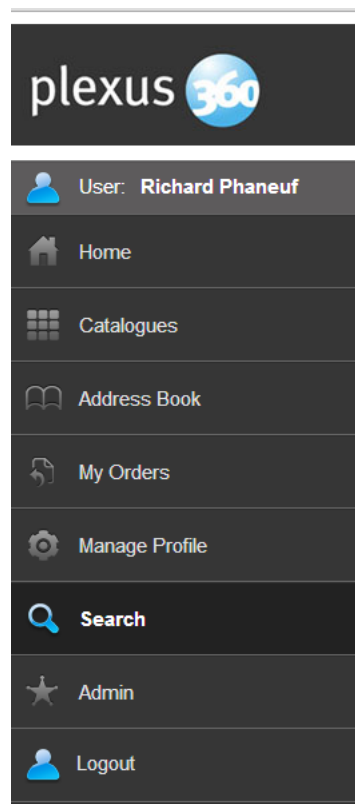
*Not only can you search while browsing a catalogue to find products within that specific catalogue, but you can also use the “Search” screen to search all the available catalogues at once.*

### Search Screen

- Select “**Search**” from the left menu.
- This will open the “**Search**” screen. From here you can use any combination of Search, Filter and Sort criteria to find products across all available catalogues.

### Note:

When searching in this manner, a product may appear multiple times in your results list as it may be found in multiple catalogues.



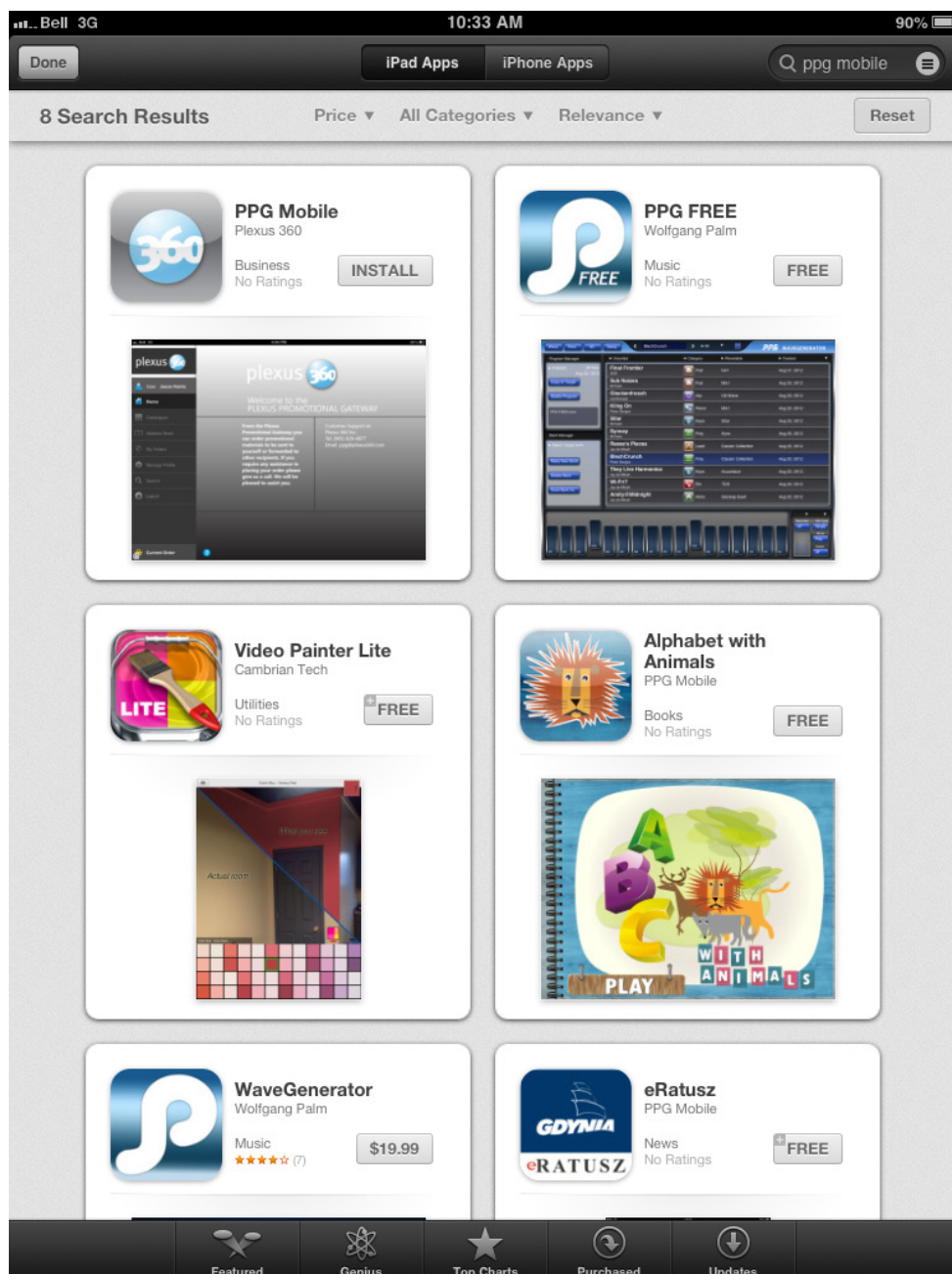
## iPad Application

### Installing the PPG Mobile Application

To install the PPG Mobile application, simply visit the Apple App store on the iPad.



Using the search bar, search for 'PPG Mobile' and select the app icon from the list of returned results.



From here, simply select “Install” to install the PPG Mobile Application on the iPad.



### Note:

Remember you will need to enter your “Company ID” upon your first login into the PPG Mobile Application. If you don’t know this ID, speak to you System Administrator about acquiring it.



## Closing/Stopping the PPG Mobile Application

### Note:

Completely shutting down and restarting the PPG Mobile Application, is a good troubleshooting method if you ever experience an issue with the Application.

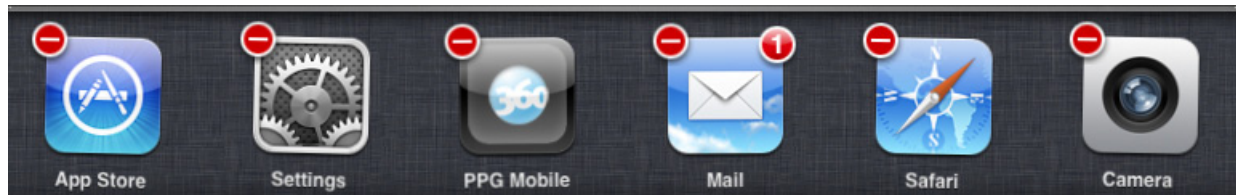
To fully shutdown the PPG Mobile application (or any iPad application); from the iPad home screen place 4 fingers at the base of the iPad screen and slide them upwards.



A black bar will appear across the bottom of the iPad screen showing all of the Applications currently running on the iPad.



Select and hold on the PPG Mobile icon until it begins to shake, and select the red minus sign, to completely shut down the application.



## Uninstalling the PPG Mobile Application

To uninstall and remove the PPG Mobile Application from the iPad, select “Settings”. Under the “General” tab, select “Usage” from the right menu.



Under the “Storage” section, select “Show all Apps” and look for the PPG Mobile Application icon.

Select the PPG Mobile Application, and select “Delete App” to uninstall the application from you iPad.

